

Washington State Ferries 2006 Origin/Destination Onboard Survey Summary Report

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**Washington State
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Purpose of the Origin-Destination Onboard Survey

- To capture accurate measures of customer travel patterns and support analysis in order to:
 - Identify significant trends in ridership travel characteristics;
 - Update data inputs to ferry travel model for use in WSF Long-Range Plan; and
 - Provide input to terminal capital improvement projects.
- WSF now has a series of similar surveys from which to compare data
 - 1993, 1999, and 2006
 - Surveys taken during “average” months of May or October

Home Locations for Weekday Riders

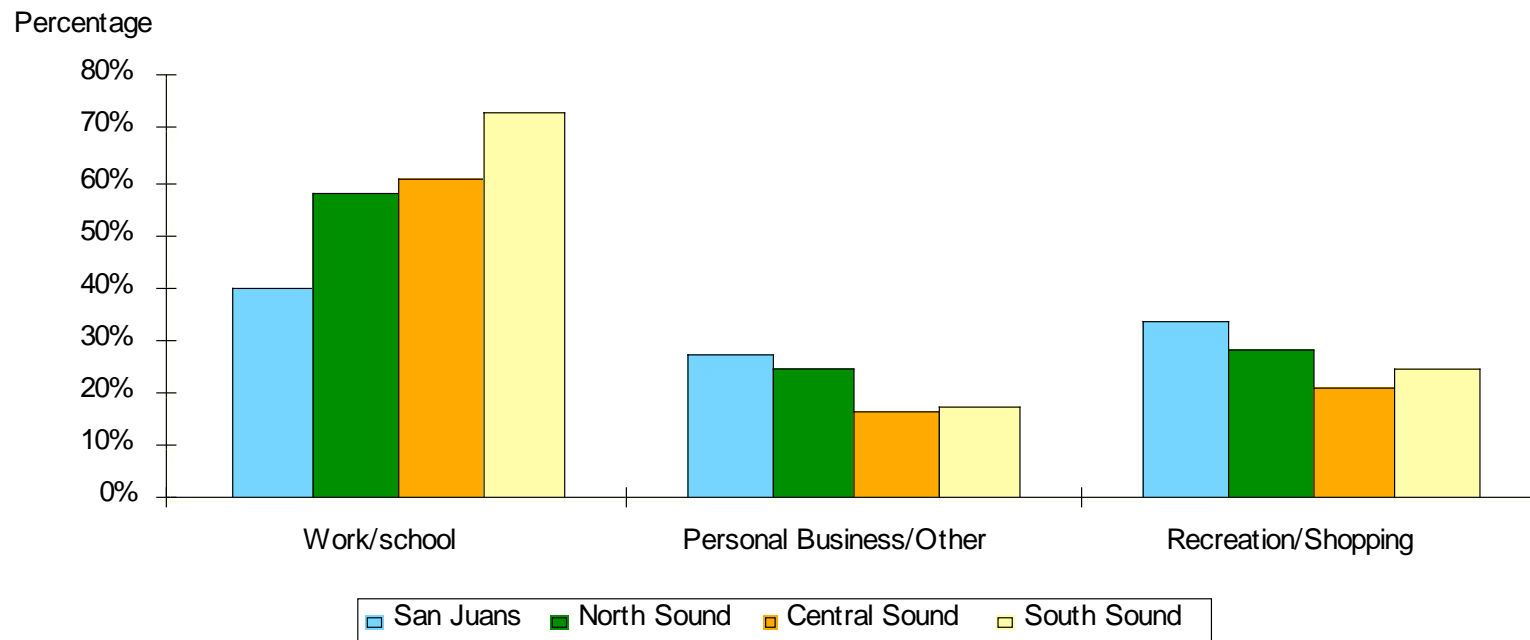
Service Area Corridors

- San Juan Island Corridor
 - Serves San Juan Islands, and Sidney, BC
- North Sound Corridor
 - Serves Whidbey Island and points north
- Central Sound Corridor
 - Serves Bainbridge Island, North /Central/South Kitsap County, and the Olympic Peninsula
- South Sound Corridor
 - Serves South Kitsap County and Vashon Island

Snapshot of the System

Trip Purpose

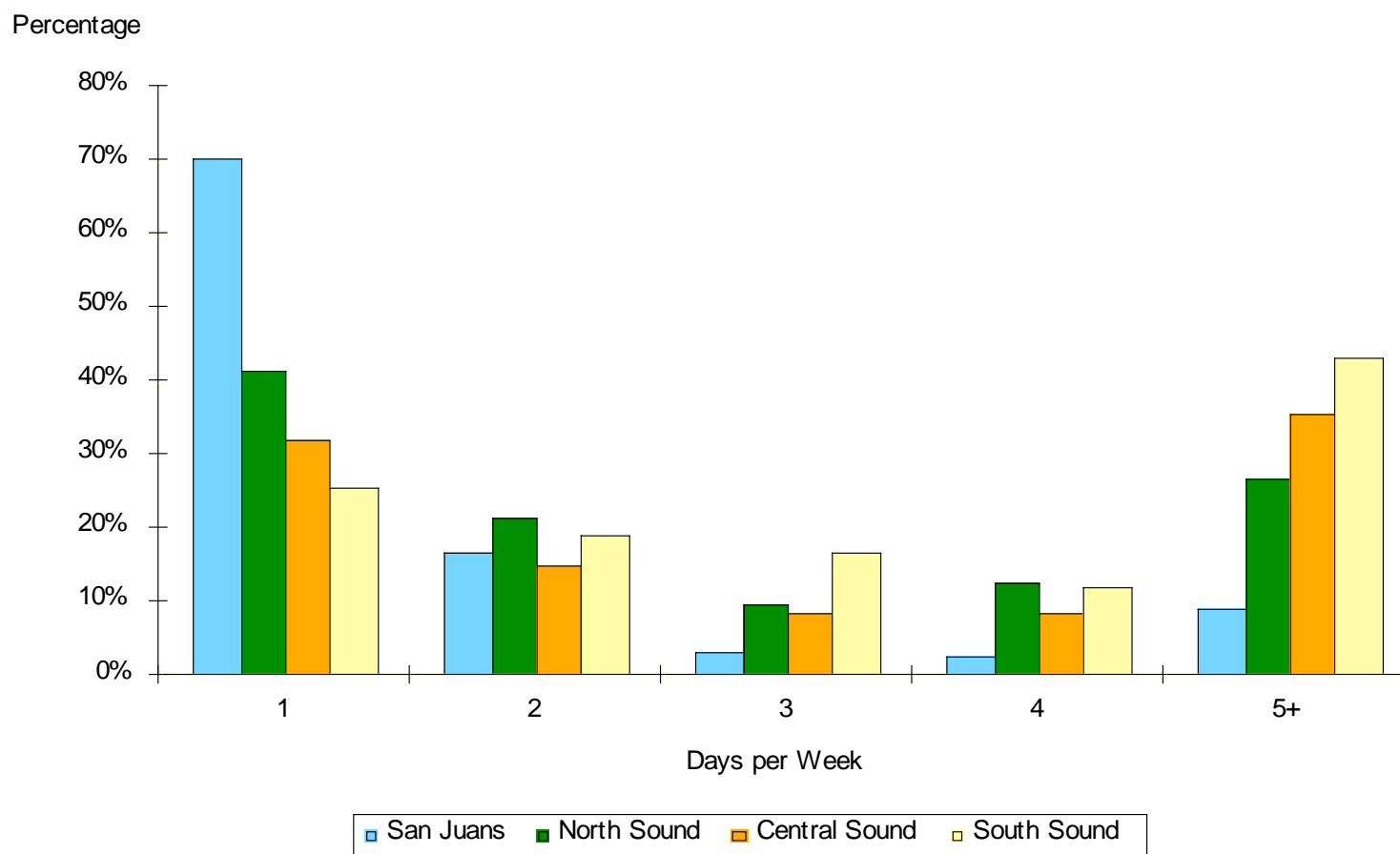
- Work trips are proportionately higher in the southern routes, and lowest in the north.
- Personal business/other trips are higher in the northern routes, and lowest in the south.
- Recreational trips are highest in the northern routes, and lowest in the central sound.



Snapshot of the System

Frequency of Travel

- More weekday travelers in the South Sound Corridor are likely to travel four or five days per week than in any other corridor



Systemwide Background Trends

▪ 2006 System

- 65,300 riders per day
(10 percent decrease)
- \$10.49 average vehicle fare
(39 percent increase)
- \$5.76 average passenger fare (43 percent increase)

▪ 1999 System

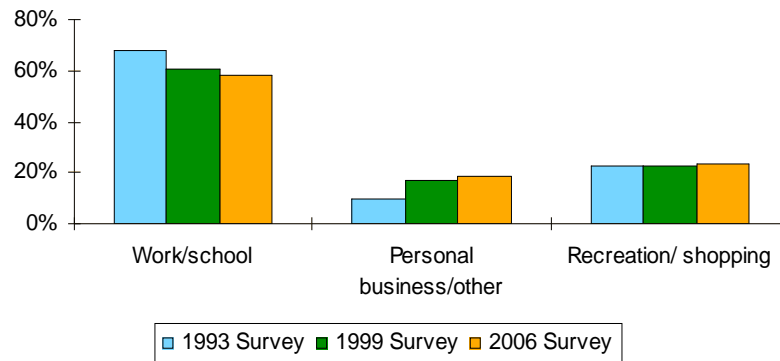
- 72,200 riders per day
(63,300 riders per day in 1993)
- \$7.55 average vehicle fare
(in 2006 dollars)
- \$4.02 average passenger fare
(in 2006 dollars)

Systemwide Trends – 1993, 1999, 2006

Trip Purpose

Weekday Riders

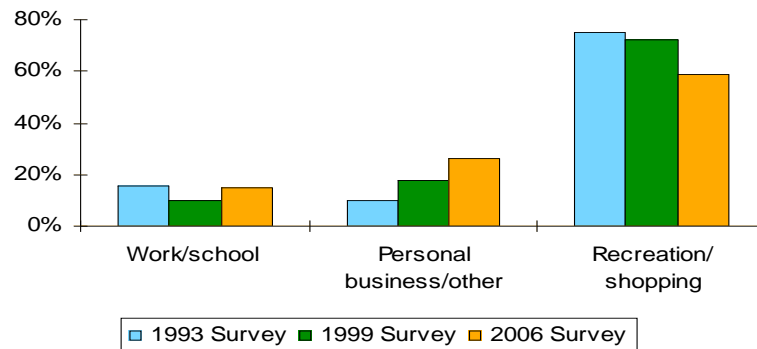
Percent of
Daily Travel



- Work trips are declining as a percent of weekday travel.

Weekend Riders

Percent of
Daily Travel

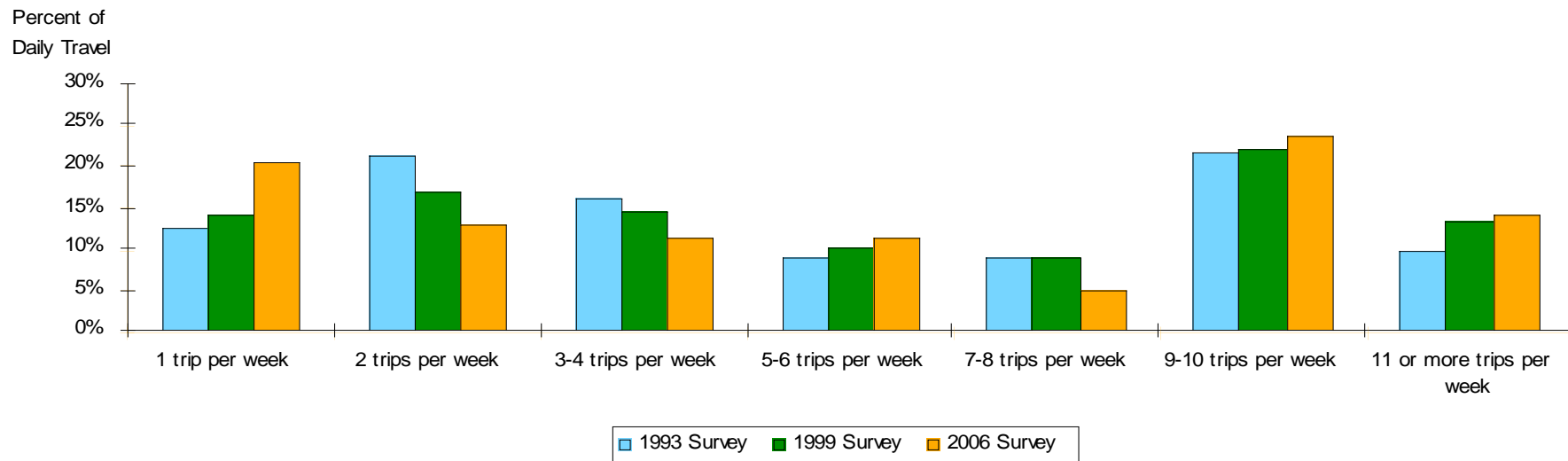


- Recreation trips are also declining as a percent of weekend travel.

Systemwide Trends – 1993, 1999, 2006

Frequency of Travel

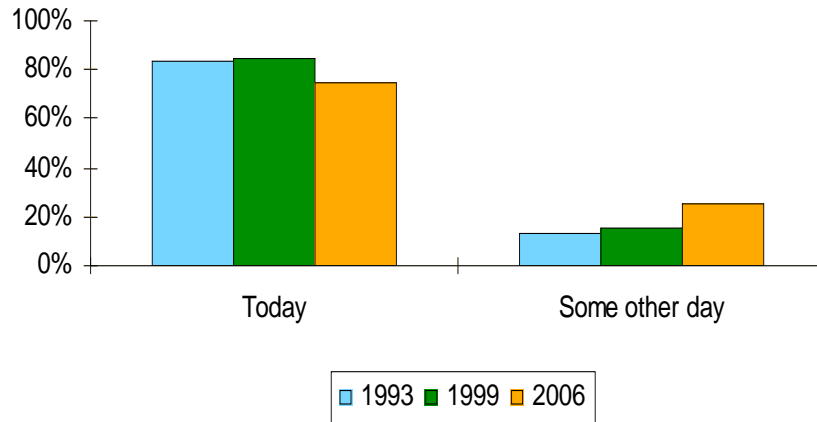
- Average number of trips per week have declined slightly since 2006.



Systemwide Trends – 1993, 1999, 2006

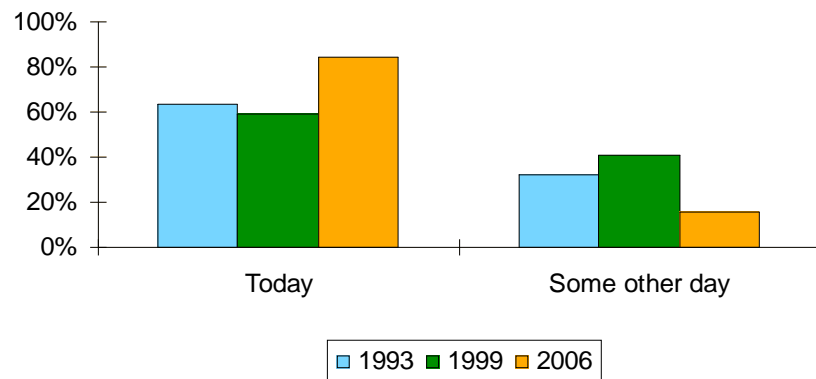
Round Trip Characteristics

Weekday Travelers



- Weekday travelers are slightly more likely to return on a different day.

Weekend Travelers



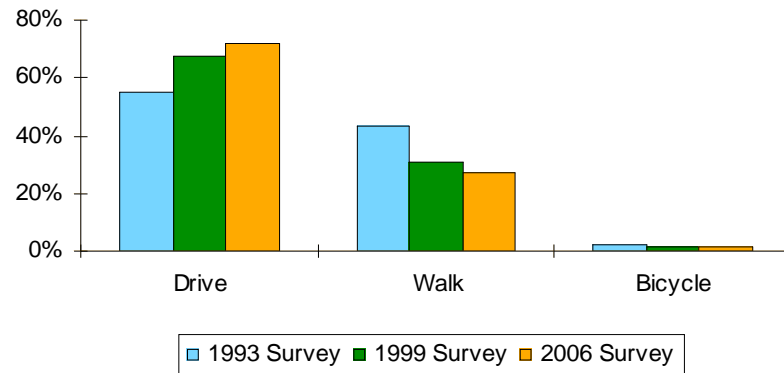
- Saturday travelers are less likely to return on a different day than Sunday travelers.

Systemwide Trends – 1993, 1999, 2006

Boarding Mode

Weekday Riders

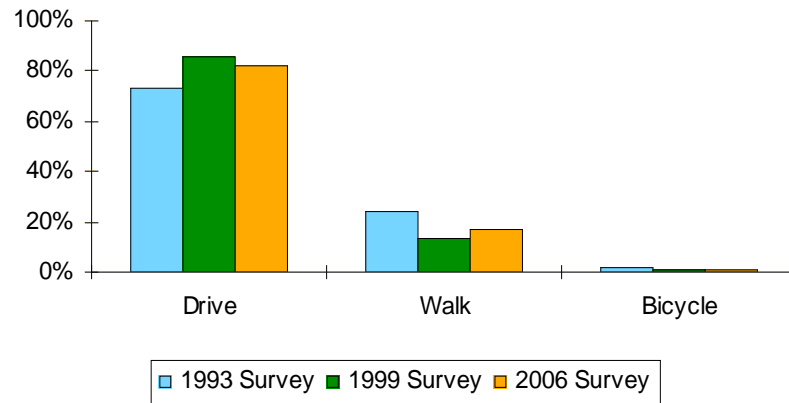
Percent of
Daily Travel



- A slightly higher proportion of weekday riders are boarding in vehicles.

Weekend Riders

Percent of
Daily Travel

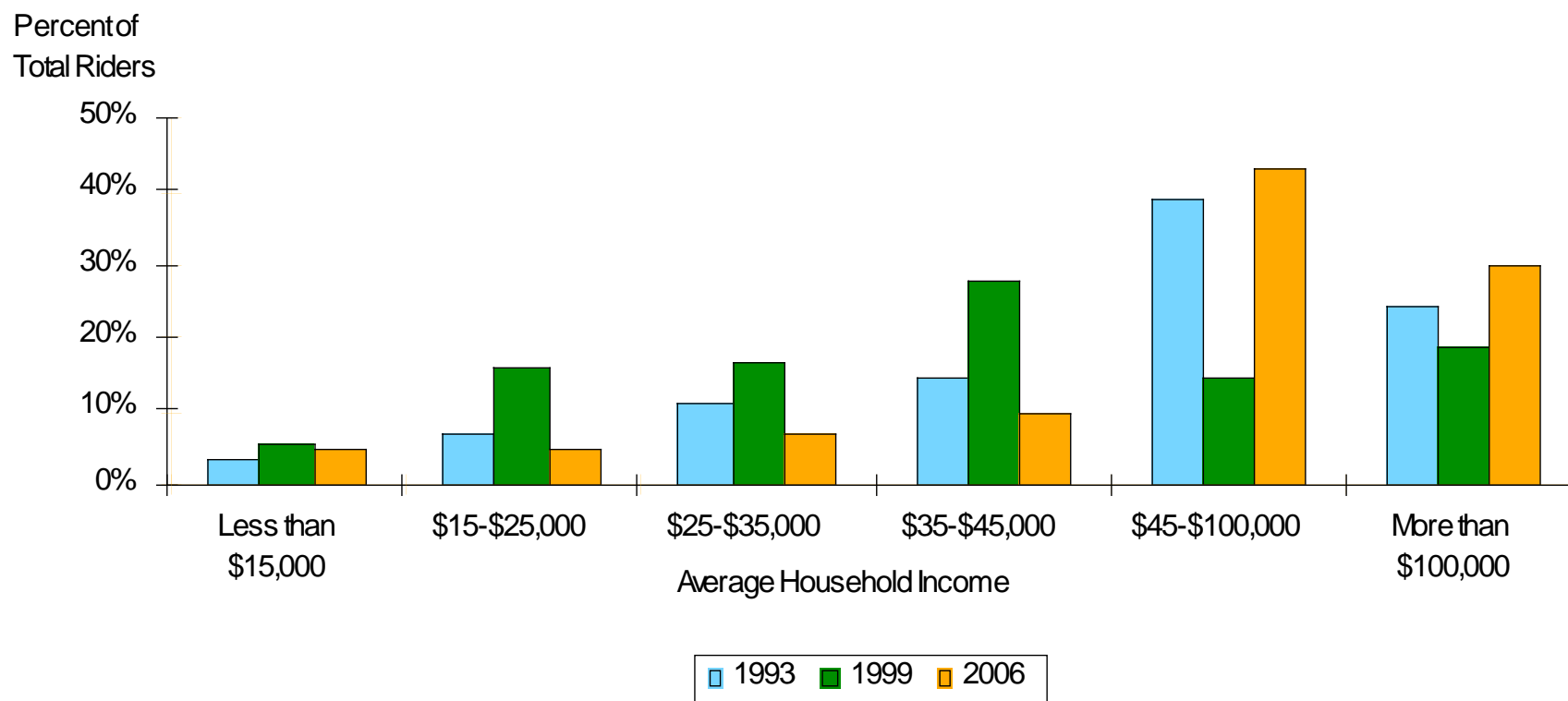


- A slightly higher proportion of weekend riders are boarding as foot passengers.

Systemwide Trends

Average Household Income for Ferry Riders

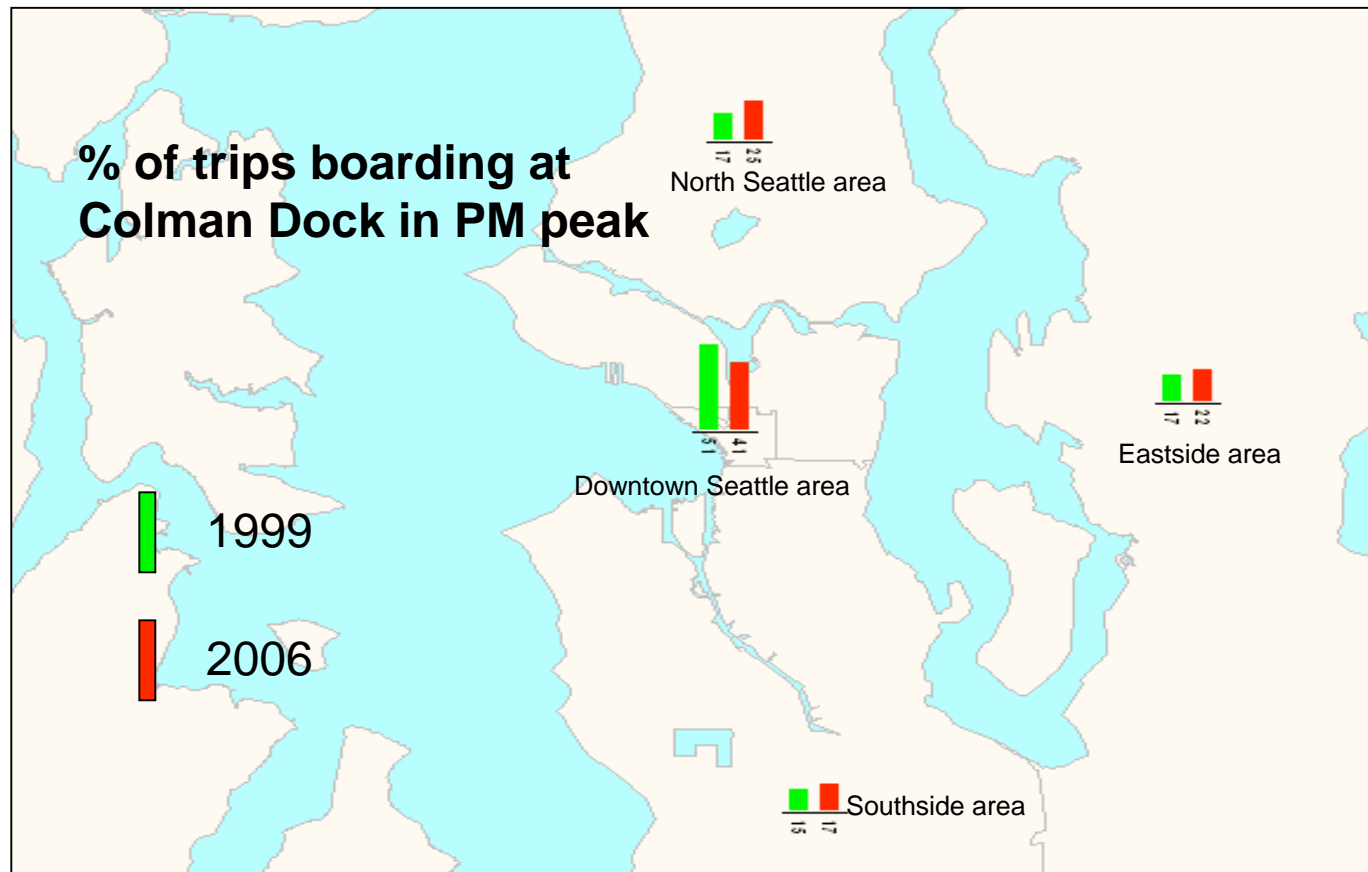
- Proportionately fewer low and middle income people are riding ferries in 2006 compared to 1999.
- Income distribution of 2006 ferry riders more closely resembles 1993 than 1999.



Travel pattern is more dispersed today compared to 1999

Seattle-Bainbridge (Westbound) Example

- Trips originated from downtown Seattle decreased from 51% in 1999 to 41% in 2006.
- Similar trends noted for Seattle – Bremerton run.



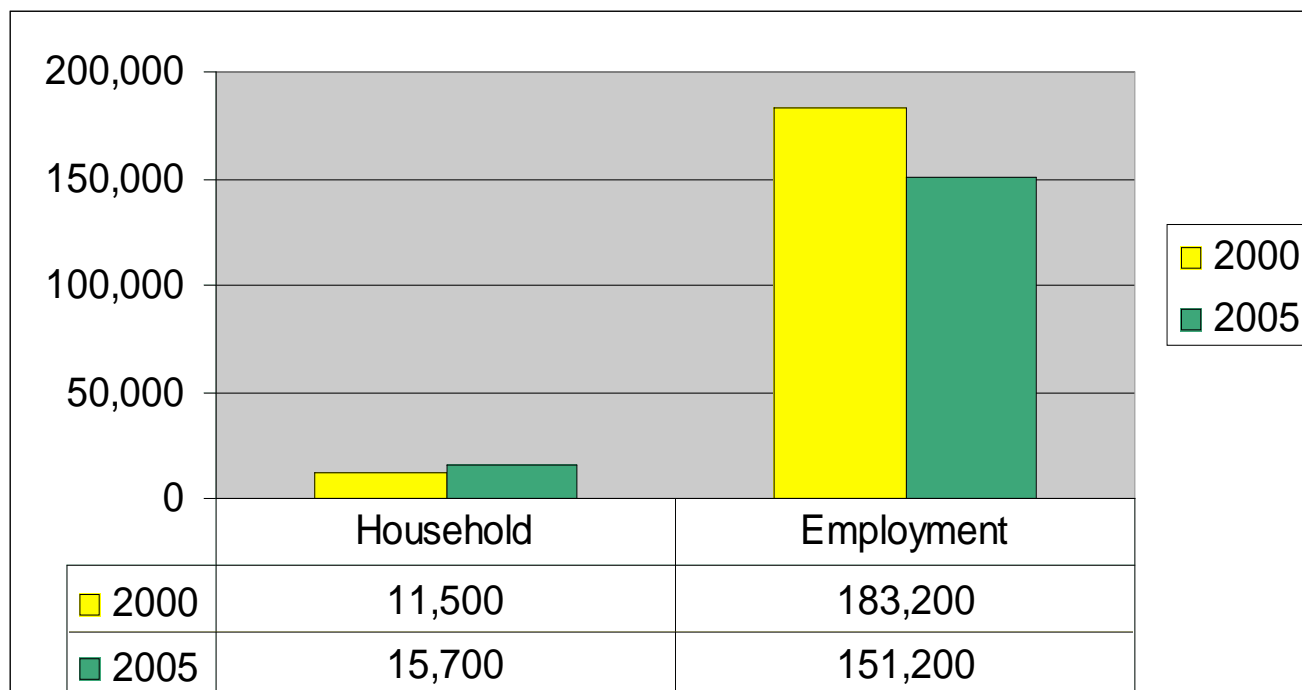
Ferry ridership has declined since 1999

- Between 1999 and 2006 system wide:
 - Total ridership decreased by 10%
 - Vehicle ridership decreased by 5%
 - Walk-on ridership decreased by 21%

- Between 1999 and 2006 for downtown Seattle routes:
 - Total ridership decreased by 16%
 - Vehicle ridership decreased by 9%
 - Walk-on ridership decreased by 26%

Seattle downtown land use changes

- Total households increased by 6.4% between 2000 and 2005
- Total employment decreased by 3.8% between 2000 and 2005
- Downtown employment forecasted to increase again, however



Additional Trip Pattern Observations

- **San Juan Islands:** Traffic during the weekday is proportionately more oriented toward San Juan Island. On weekends, it's proportionately more oriented toward Orcas Island.
- **North Sound:** Origin and destinations on Port Townsend-Keystone are more clustered in Port Townsend than they were in 1999.
- **Central Sound:** The Central Kitsap area seems to be more oriented toward the Seattle-Bremerton route than Seattle-Bainbridge, a shift since 1999.
- **Telecommuting:** 20% of weekday riders said they telecommute at least one day a week.

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